



# STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

**Working Title**

Taxpayer Assistance and Public Outreach Director

**Job Code Title**

Operations Manager I

**Pay Band**

8a

**Job Code Number**

111218

**Director's Office**

Executive Office  
Office of Taxpayer Assistance

**Fair Labor Standards Act**

Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Director's Office supports the agency's Director and is composed of five work units: Legal Services Office; Office of Tax Policy and Research; Office of Human Resources and Organizational Development; Office of Taxpayer Assistance; and the Executive Office. The Office of Taxpayer Assistance provides understandable tax information; receives and evaluates complaints related to improper or abusive behavior or inefficient service provided by employees of the department and recommends appropriate action to the director of the department to resolve the complaints; compiles data on the number and type of taxpayer complaints received and evaluate the actions taken to resolve complaints; surveys taxpayers to obtain their evaluation of the quality of service provided by the department; and monitors the department's collection activities and compliance with the taxpayer bill of rights and reports abuses to the director of the department.

**Job Responsibilities**

The Taxpayer Assistance and Public Outreach Director provides overall vision and direction to the taxpayer assistance and public outreach programs and activities of the department and acts a source of independent evaluation and advice concerning taxpayer complaints. The incumbent coordinates communications regarding legislative issues, taxpayer affairs, and department activities; manages public relations; and sets priorities for the function of the office. The incumbent is an active member of leadership, driving a variety of taxpayer assistance and outreach duties. Responsibilities include taxpayer assistance; developing positive; and special projects assigned by the director. The position reports to the director and does not supervise other staff.

- **Office of Taxpayer Assistance Implementation 40%**

The incumbent assists the director in developing plans and policies for the Office of Taxpayer Assistance; providing easily understandable tax information; and answering taxpayer questions regarding preparing and filing of returns and reports with the department. This includes assessing statewide needs and coordinating the development of a strategic plan in conjunction with agency management, public and private organizations, and individual Montanans.

1. Establishes overall vision and direction for the Office of Taxpayer Assistance and Public Outreach. Sets long and short-term goals for the office and develops objectives to manage

them effectively. Leads long range planning; prioritizes needs and issues in terms of the agency mission. Provides expertise in the type, nature, and extent of taxpayer assistance and public outreach programs and practices.

2. Monitors the department's compliance with the Taxpayer Bill of Rights and the department's collection activities in accordance with 15-1-223, MCA. Makes appropriate reports and recommendations to the director regarding the implementation of goals and objectives. Works with the Chief Counsel, Department Hearings Officer, and Director to develop rules and procedures that define the role of the Office of Taxpayer Assistance in relation to the Office of Dispute Resolution. Provides information to the public so that complaints or disputes are properly handled by the department without unnecessary confusion, duplication, inconvenience, or cost to taxpayers or the department.
3. Establishes priorities and deadlines, assigns projects, and allocates resources and budget to insure deadlines and objectives are met.
4. Compiles data on the number and type of taxpayer communications received. Evaluates actions taken to resolve issues and concerns and customer satisfaction.
5. Establishes effective performance measurements for the program. Ensures the performance measures are met through customer needs assessments. Set quality standards for services. Evaluates customer satisfaction.
6. Determines the department's strategy on complex and controversial taxpayer assistance issues. Understands cause and effect relationships; recognizes similarities and differences in situations; and applies knowledge to make effective decisions or come up with ways to resolve challenges.
7. Analyzes a wide range of general and technical information about taxpayer issues. Determines the type, nature, and extent of taxpayer assistance and public outreach programs and practices best suited to support the department's mission. Recommends policies, practices, and operations to improve the department's ability to respond effectively to taxpayer needs. Ensures they adhere to federal and state laws and regulations and department policy.
8. As the senior level advisor on taxpayer assistance and public outreach trends and issues, ensures that agency managers are aware of major taxpayer issues affecting the agency. Provides guidance and consultation to management teams in taxpayer assistance matters.
9. Effectively handles the controversies that hinder programs and erode public trust. Investigates issues to define all pertinent information; verify facts; interpret legislative intent and statutory/administrative responsibilities; develop alternatives for solutions; mediate disputes; and achieve consensus among individuals and groups with diverse views.
10. Build long-term internal/external relations with people and organizations who can provide assistance and with other interested or affected parties. Develops networks that ensure the agency's strategic plan meets the needs of the state. Develops and maintains constructive and cooperative working relationships with members of the public; organizations affected by the department's work; and business and community leaders in the state.

- **Public Relations 20%**

The incumbent manages relationships with public constituencies and other agencies as the department's public liaison. Plans department strategies and programs to achieve successful public participation in taxpayer support programs.

1. Advises the director and department managers on departmental issues and events of public significance that affect the department. Develops and implements a detailed public involvement plan that outlines the department's strategy for achieving successful public participation
2. Develops and implements procedures and projects that actively engage citizens, organizations, and other public agencies and officials interested in or affected by the department's decision-making process. Fosters meaningful public involvement to increase the department's knowledge and understanding of their information, expertise, views, and

concerns and to increase public knowledge, understanding of, and confidence in the department's operations and decisions.

3. Negotiates and resolves issues with internal/external customers. Ensures that the department assists taxpayers by receiving and independently evaluating taxpayer complaints and recommending appropriate action to the director. Proactively communicates with internal and external customers. Follows up to make certain that customer expectations have been met.
4. Represents the department to public and private agencies and groups, the press, the legislature, etc., as appropriate. Develops, organizes, and coordinates public meetings, public hearings, information meetings, and other communication and education events to seek knowledge, ideas, and views of citizens, organizations, and other public agencies and officials concerning the department's operations and decisions.
5. Proactively communicates with internal and external customers and follows up to make sure that customer expectations have been met. Ensures that communication occurs at all organizational levels and between all appropriate people. Encourages open expression of ideas and opinions.
6. Develops and implements programs that actively involve stakeholders in the department's decision-making process for the purpose of building stakeholder support and confidence in the department; improving the department's overall image in terms of responsiveness, openness, and willingness to change; and creating a more favorable perception of the department.
7. Researches and analyzes potential projects or existing work processes where public involvement would likely result in improved relationships and other benefits to the department. Employs various methods such as key-person interviews, focus groups, and public opinion surveys to gather information on viewpoints of key stakeholders regarding specific issues.
8. Organizes and coordinates public meetings, public hearings, information meetings and other public involvement techniques to proactively seek the participation and support of stakeholders in the planning or redesigning of department projects or work processes.
9. Creates and staffs advisory committees, inter-disciplinary teams, and task forces as appropriate to meet the department's public participation goals. Develops a system for handling stakeholder input that makes them feel valued. Ensures stakeholders' ideas are given proper consideration. Incorporates constructive ideas into the department's work as appropriate.
10. Supervises the provision of understandable tax and other information through the department's web site and other electronic means. Develops a strategic plan for improving the web site and other electronic information services. Implements the plan with assigned resources and staff.
11. Establishes two-way communication and education between the department and its stakeholders through a variety of techniques including mailings, computer presentations, interactive television, teleconferences, speaking engagements, website content, and special events. Develops documents and other materials that communicate information effectively concerning Montana's tax system and its administration by the department.
12. Advises and assists the department in understanding best practices, regulations, and requirements for public meetings, public hearings, and other public involvement events and processes. Uses technology to enable those citizens and officials who are not present in Helena to participate in department events and meetings.
13. Works with the public information officer to provide key stakeholders and the general public with useful, timely information such as news accounts of public hearings; notification of department decisions; summaries of public concerns; and progress reports during program implementation. Keeps employees informed of public participation efforts by providing useful, timely information about the program's efforts. Implements those portions of the department's communication strategy that relate to public involvement.

14. Creates and maintains a comprehensive stakeholder database that identifies key constituents and other interested parties to be targeted for public outreach and education.

- **Economic Development Liaison 15%**

The position is the department's liaison with economic development agencies and point of contact on economic development information and issues. The incumbent communicates regularly with the Governor's Office on Economic Development and the Department of Commerce on information the department is likely to be called upon to provide concerning Montana's tax system in conjunction with potential economic development projects in Montana.

1. Coordinates the department's response to requests for information and participation in meetings concerning economic development projects.
2. Develops understandable documents and materials that communicate features of Montana tax systems to businesses, prospective investors, state and local agencies, economic development organizations, and other interested parties.
3. Undertakes other activities and projects to help ensure that Montana's tax system and its administration by the department are understood as clearly as possible by those parties involved in economic development efforts.

- **Legislative Relations 15%**

The incumbent assists the department's management team in formulating, refining, and presenting legislation that affects department operations and relations with taxpayers.

1. Reviews and analyzes legislation, laws, and public policy and recommends changes. As the legislative liaison for taxpayer assistance issues, provides legislative testimony as required and prepares any required fiscal notes.
2. Assists the director and deputy director in representing the department to the Montana legislature and responds to legislative requests.
3. Participates in developing ideas and content of department legislation. Interprets current laws, rules, and policies relevant to taxpayer relations. Develops information and materials that effectively communicate information concerning legislative issues affecting the department.
4. Communicates with citizens and organizations concerning department legislative activities.

- **Other Duties as Assigned 10%**

1. Conducts special projects that may be assigned by the director or deputy director. These typically involve building relationships or conducting activities with other public agencies, with other levels or types of governments, intergovernmental organizations, or other entities.
2. Specific responsibilities will be determined by the director and may change as needed.

### **Job Requirements**

To perform successfully as the taxpayer assistance and public outreach director, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Skills in communicating effectively through writing, public speaking, and editing; public relations; active listening; social perceptiveness; and in responding objectively and calmly to situations involving angry individuals with divergent views are required. It is essential that the incumbent has the ability to think creatively; build consensus; negotiate; and build relationships. Seasoned judgment in decision making is necessary since the work is performed with minimal guidance and within broad guidelines. The incumbent is expected to apply critical thinking skills; be a problem solver with the ability to identify and resolve tactical and strategic issues before they become problematic; resolve operational issues; elevate matters as necessary; recommend solutions; and effectively implement changes management directives. The position requires considerable skill in developing approaches to issues that have significant economic impacts on the state and taxpayers; program planning and implementation; negotiation, facilitation, and mediation; leadership techniques; and project management. It is essential that the incumbent has the ability to work cross-functionally with all levels of senior management and employees and work effectively under pressure.

The incumbent must demonstrate professional knowledge of concepts, theories, and practices of public administration, public relations, strategic planning, economics, and business administration. The position requires knowledge of business law; governmental organizational structure; government accounting and budgeting; applicable state and federal regulations; public relations and communication; management theory and techniques; performance management; operational and program planning; organizational theory; project management; and legislative and administrative rule processes. The work requires knowledge of the direction and policies of the department; issues regarding the state and their impacts on division operations; in-depth knowledge of the methods, rules, laws, and functions of division programs; and applicable state and federal revenue laws and regulations. Knowledge of computers and database management including state and information systems (GenTax, TAP, ORION); data collection, analysis, and reporting techniques; compliance requirements and practices; and customer service standards are also required.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in public administration, business administration, taxation, public relations, public relations, public affairs, communications, journalism, economics, or a related field and six years of job-related work experience.
  - Work experience should include progressively responsible experience in public administration with at least three years developing policy, interpreting laws, and representing agencies or organizations to public bodies or officials. Must demonstrate experience where excellent skills in leadership, direction, administration, and management are evident.
  - Other combinations of education and experience will be evaluated on an individual basis.

### **Department Core Values**

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

### **Working Conditions**

This position has considerable mental stress and pressure due to workload; conflicting, multiple priorities; critical projects with hard deadlines; time constraints; significance of decisions made; the challenging nature of contacts with taxpayers, elected officials, etc.; and coordination of taxpayer assistance and public outreach. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. Work hours may exceed 40 hours per week from time to time. Leading up to and during legislative sessions work hours routinely exceed 40 hours per week and may include

working evenings and weekends. May involve minimal travel some of which may be out of state therefore a valid Montana driver's license is required. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

### **Special requirements**

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

**This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.**

**Division Administrator Review:** The statements in this job profile are accurate and complete.

Signature: Alan Peura, Deputy Director      Date: August 2010

**Human Resource Director Review:** The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director      Date: August 2010

**Employee:** My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name (print): \_\_\_\_\_